Shaping Tomorrow's Future Today

2014 TASFAA Annual Report

El Paso



Texas Association of Student Financial Aid Administrators

TASFAA Leedership

President's Letter by Melet Leafgreen



TASFAA members and Friends of TASFAA -

Another TASFAA year comes to a close, and what a year it's been! Members of organization have faithfully served hundreds of thousands of college students and families this year.

You had a wonderful Board of Directors this year. This tremendously dedicated group of people has worked to

ensure that the important work of TASFAA not only continues, but is improved and made stronger every year. My thanks to them for showing up, contributing, and putting up with my Presidential antics.

This was a big year for TASFAA. In our joint Regional Training with TG and THECB we provided free training to over 500 financial aid administrators at 7 sites across the state. Our training committee boasted 72 attendees at this year's New Aid Officer's Workshop in Arlington. Our Facebook page is growing in popularity. We made our positions known through interaction with lawmakers in our state and at the Federal level. We offered free financial aid training to nearly 1000 high school counselors in various regions in the state. Finally, our Fall Conference in El Paso was a great success offering training and networking opportunities for 230 of you.

I've heard it said many times, and I wholeheartedly agree: the Board of Directors may be the ones with the big ideas (sometimes), but the real work gets done by the committees. Our committee members, led by our awesome Chairs, are those who really keep the activities of TASFAA rolling. If you served on a committee this year, you have my (and the Board's) gratitude for your hard work and dedication.

I'd also like to thank TASFAA's Associate Members. These individuals don't work for schools – instead they work for all the other agencies, businesses, and entities that have a stake in college access and success for Texas' college students. Their leadership and overall contribution to the Association cannot be overstated and is much appreciated.

Special thanks to Devon Wiggins (Tyler JC), Shannon Followill (TTU), and Dana Mingo (DCC) who took up the reigns when I was on maternity leave with my precious new son this past summer. I could not have asked for a better group of people to perform officer duties in my absence, and being able to focus on my baby for a couple of crucial months is a gift my family will not forget.

TASFAA's mission is to encourage, promote, facilitate, inspire and motivate. If the definition of a family is a group of people who care for and support each other, who build each other up and try to make every member feel important, then TASFAA is a family. I'm proud to be a member of your family. On to bigger and better things in 2015!

Fondly, Melet Leafgreen Texas Christian University

Officers 2013-2014

President Melet Leafgreen, Texas Christian University

Vice President

Devon Wiggins, Tyler Junior College

President Elect

Anne E. Walker, Rice University

Past President

Dana N Mingo, Dallas Christian College

Treasurer

Fabian Vasquez, Texas Tech University HSC

Secretary/Historian

Shannon L Crossland-Followill, Texas Tech University

Board Members

Alan D. Ahmad, Alamo Community College Jeannie Gage, Texas A&M Corpus Christi Cecelia K Jones, Wiley College Donnie Purvis, Weatherford College Sonia N Townsend, San Jacinto Community College Ed Turney, University of North Texas Jason R Young, University of Texas at Arlington Cathleen Wright, Texas Lutheran University



TASFAA Mission

TASFAA Mission Statement

TASFAA is a professional organization with a diverse membership that works toward the ultimate goal of helping students gain necessary resources to promote access and choice in their pursuit of higher education opportunities.

Mission

The Association fosters commitment to these activities through initiatives collectively known as TASFAA's Preferred Future. These initiatives are: Training and Education; Technology; Outreach and Early Awareness; Partnerships; and Legislative.

Description

The Texas Association of Student Financial Aid Administrators (TASFAA) promotes the effectiveness of student financial aid programs in the post-secondary institutions of the state, facilitates communication among its members, sponsors activities in the financial aid field to promote the professional development and competency of its members.

TASFAA Volunteer Form

TASFAA is a volunteer organization. Your participation is needed. Membership on a committee benefits your colleagues, students and parents, as well as providing an opportunity for personal and professional development.

If you have further questions regarding the activities of a specific committee, please feel free to contact the current Committee Chair or a member of the Executive Board.

Please Note: YOU MUST BE A CURRENT MEMBER OF TASFAA TO SERVE ON A COMMITTEE. If you are not a current member please complete a membership application. Don't know if your TASFAA membership is current, find out - check your membership status here.

Volunteer Now! http://www.tasfaa.org/docs/forms/memVolunteer.html



Awards & Scholarships

Sefra M. Lopez - Texas A&M University, Committee Chair Bridget Moore - Hardin-Simmons University Chris Woodyard - University of Texas-Arlington Demetrice Dent - University of Houston Casey Wells - Tyler Junior College Angelika Williams - Texas State University Jael Garcia - University of Texas-Pan American

1. Mack C. Adams Scholarship Update:

Received 14 scholarship applications and awarded 7 scholarships.

2. TASFAA Awards updates:

Financial Aid Star - Received 10 nominations of which 2 were incomplete or ineligible. Our nominees came from Texas A&M, TCU, San Antonio College, Texas Tech, Alamo Colleges, and DCCCD. Winner was Trudy Conner of TCU. Hall of Fame - Received 3 nominees. Winners were Delisa Falks, Texas A&M - Hall of Fame: Unsung Hero and Don Buehrer, Nelnet - Hall of Fame: Friend of TASFAA Trailblazer - Received 2 nominees. Winner was Jennifer Nanni, TCU.

Years of Service Award Winners

40 Years of Service

Terry BazanAustin Community CollegeEarl HudginsPanhandle-Plains Management &
Service Corp.Governor JacksonTexas Woman's UniversitySonje JohnsonUniversity of Texas - Austin

35 Years of Service

Myrna Wyckoff Dallas Baptist University James Kubacak McLennan Community College Oscar Garcia New Mexico Educational Assistance Foundation Ann Duncan Panhandle-Plains Management & Service Corp. Elizabeth Bandy **Rice University** Linda Ballard Texas Southern University Elaine Rivera University of Texas - Pan American

30 Years of Service

Tomas Campos Cynthia Butler Juanita Maese Linda Craft Barbara Lytle Alamo CCD Dallas County CCD El Paso Community College KD Studio, Actors Conservatory Panhandle-Plains Management & Service Corp. Ken Evans Zelma DeLeon Cammy Penrod Sanford-Brown College - Dallas University of North Texas University of Texas - Brownsville

25 Years of Service

Cvnthia Bazan Austin Community College Gail Braswell Austin Community College Lawrence Guttierrez Austin Community College Houston Baptist University Debora Burnett Brook Pallanez Sallie Mae Deborah Porter-Amev San Jacinto College Anna Lopez South Texas College Janie Alcala Texas A&M University Belen Valdez Texas A&M University Jeannie Gage Texas A&M Univ - Corpus Christi Natalie Sunderlin Texas Higher Education Coordinating Board Rhonda Beauchamp Texas State Technical College - Waco Connie Chance Texas State Technical College - West Texas Joe Braxton TG TG Sam Wilson Julie Lively Trinity Valley Community College Rhonda Summerbell University Federal Credit Union Cathy Coursey University of North Texas Chris Woodyard University of Texas - Arlington

20 Years of Service

Ed Kerestly Kay Mooney Bob Cole Sharetta McKenzie Caroline Hernandez Cynthia Chavez Norma Tobias Kathryn Kimmey Raymond Jaramillo Sandra Guzman Kimberly Mosley Ken Garrett Nicole Verrett Colleen Krumwiede Ann Lague Brett Lindquist

Myra Pfannenstiel Kerry Olson Alma Garcia John Denton Vicki Kane Tina Faulkner Lynda Foster Douglas Akins Joseph Pettibon Melissa Moncivais

Abilene Christian University Amarillo College American Student Assistance Anthem College Austin Community College Baylor University Baylor University Blinn College Clarendon College College of the Mainland Dallas County CCD Financial Aid Services (FAS) Financial Aid Services (FAS) Financial Aid TV Financial Aid TV Great Lakes Educational Loan Services, Inc Inceptia Lamar State College-Orange Laredo Community College Lone Star College System San Jacinto College Socle Education South Plains College Texas A&M University Texas A&M University

Texas A&M University - Kingsville

Years of Service Award Winners (cont'd)

Arthur Goudeau Tanya Trevino

Marisol Gutierrez Jana Polansky Helen Carter Greta Wheeler Kim Alexander Maria Luna-Torres Donna Smith Leslie Wells Trina Manor Veronica Cano Ellen Nystrom Texas Chiropractic College Texas Higher Education Coordinating Board Texas Southmost College Texas State Technical College - Waco Texas Tech University Texas Woman's University TG TG TG University of Houston - Clear Lake University of Texas - Austin University of Texas - El Paso University of Texas - San Antonio HSC

15 Years of Service

Felicity Swann Brent Williford Phillip Applebaum Claudia Jaramillo Matt Lehmann

Brenda McCafferty Danielle Mayes Ralpheal Guilbeau Jennifer Hoffpowier Judy Holley Ashlie Resendez Randal Dement Amy Hardesty Rachel Atkins Latisha Williams Michelle Wells **Christy Phillips** Thomas Rodriguez Tish Owen Charlotte Farrington Judi Haas Debra Redix Carol Exum Debbie Mattke Thomas Oliver Larry Gantt Gail Johnson

Vanessa Negrete Gloria Priest Linda Johnston Esmeralda Varela Shannon Greeson LaRease Thomas Jason Young Delia Heras

Amarillo College Blinn College Brazos HESC El Paso Community College Great Lakes Educational Loan Services. Inc Inceptia ITT Technical Institute - Waco Lamar University LeTourneau University LeTourneau University Lone Star College System Lubbock Christian University Lubbock Christian University McMurry University Midland College Midwestern State University Nelnet **Rice University** Southwestern University Texas A&M University Texas A&M University Texas A&M University - Corpus Christi Texas A&M University - Kingsville Texas Lutheran University Texas Lutheran University Texas Southern University Texas State Technical College - West Texas Texas Tech University Texas Tech University Texas Woman's University TG University of Mary Hardin-Baylor University of St. Thomas University of Texas - Arlington

University of Texas - El Paso



Maribel Landa Belinda Ovalle Rayanne Hukill Casey Creel

University of Texas - El Paso University of Texas - Pan American Weatherford College Wells Fargo Education Financial Services

10 Years of Service

Michelle Bennett William Bloom Marcus Perkins Tim O'Donnell Arianna Gray Va-Linda Henrie Pamela Spain Lee Ferguson Maria Ferrer Ida Stewart Araceli Ramirez Stephen Brower Shelly Dotson Jim Jones Lieu Hodges Hanh Nguyen Sivan Flores Debra Gonzalez Linda Gonzalez Mary McGowan Deborah Lassus Jerrod Harrell

Angelo State University Angelo State University Austin Community College CMD Outsourcing Solutions Collin County Community College Collin County Community College Collin County Community College Dallas Baptist University Dallas County CCD Dallas County CCD El Paso Community College Hardin-Simmons University Hardin-Simmons University Hardin-Simmons University Higher Education Servicing Corp/NTHEA Houston Baptist University Lone Star College System Lone Star College System Lone Star College System McLennan Community College Rice University Southern Methodist University

Years of Service Award Winners (cont'd)

Patricia Goodman Carey Rose Lindsey Alexander Lynn Barnes Tricia Cisneros Karen Lepley Erin Porter Amy Suter **Ruth Torres** Mayra Juarez Claudia Gillespie Judith Jewell

Jeremiah Young

Ashley Boxie

Cynthia Ybarra

ThuyLieu Aligo

Sandra Hernandez

Felipe Olivarez III

Elaine Starr

Erika Cox

Temple College **Temple College** Texas A&M University Texas Southmost College Texas State Technical College - West Texas Texas Tech University Texas Woman's University Texas Woman's University University of Houston - Downtown University of Houston - Downtown University of St. Thomas University of Texas - Dallas Rocio Espino-Martinez University of Texas - El Paso University of Texas - El Paso University of Texas - Pan American University of Texas - San Antonio University of Texas - Southwestern Medical Center Wayland Baptist University

Kathy Gwyn

Elizabeth Rubi

Constitution & Bylaws

Committee Members:

Shannon Crossland-Followill (Chair), Texas Tech University Matt Lehmann – Great Lakes Education Loan Services, Inc. Karen J. Trail – Texas Woman's University Norma A. Urias - El Paso Community College

The Constitution and Bylaws Committee was part of a Task Force comprised of committee members and Past Presidents. The task force reviewed the Constitution and Bylaws as well as the TASFAA Policies and Procedures Manual of the Association for appropriateness and consistency as they govern the activities and needs of the Association.

Communications and Social Media

Committee Members: Jess Black, Co-Chair, Angelo State University Andrew T Rodriguez, Co-Chair, Tarrant County College

TASFAA Facebook Statistics

We have 291 likes. Out of our fans 76% are women, 22% are men. The majority of our fans are 35-44 years of age. We have one fan from Morocco! Fans ranked by city: 1. Houston, 2. Dallas, 3. Austin, 4. San Antonio, 5. College Station. We have 83 friends.

Early Awareness

Committee Members:

Jennifer Z Nanni, Chair, Texas Christian University

2013-2014 National Training for Counselors and Mentors (NT4CM)				
Date	Location	Number Registered	Number Attended	
Nov 22, 2013	Texas Christian University	59	45	
Dec 11, 2013	LeTourneau University	60	36	
Dec 10, 2013	TSTC	150	75	
Dec 11, 2013	Austin Community College	60	23	
Nov 19, 2013	University of St. Thomas - Houston	70	32	
Dec 18, 2013	Cafe College	60	56	
Jan 10, 2014	Cafe College	60	47	
Jan 14, 2014	Cafe College	60	46	
	Lubbock Christian Texas	Cancelled	Cancelled	
Dec 4, 2013	Texas A&M	50	36	
Jan 23, 2014	El Paso CC	100	39	
Jan 23, 2014	El Paso CC	100	40	
Dec 5, 2013	UTEP	100	102	
Dec 6, 2013	UTEP	100	91	
TOTALS:		1029	668	



Fall Conference

Committee Members:

Eric K. Cooper - Texas A&M University - San Antonio (Chair) Scott A. Moore - University of Houston (Co-Chair) Brenda M. Benedetti - Texas A&M University - San Antonio Yolanda M Cleveland - University of Texas – Arlington Erika M. Cox - University of Texas at San Antonio Jael E. Garcia - University of Texas - Pan American Brandy S Gilliam - Texas Woman's University Linda A Gonzalez-Hensgen - El Paso Community College Donna King - Grayson County College Raul H Lerma - El Paso Community College Lou Murray – Nelnet Amanda L Smith - Clarendon College Roy Tuberville - El Paso Community College Denise Welch - Panola College Molly M Williams - Tyler Junior College

This year's conference took us to El Paso, TX with beautiful weather and plenty of things to do and learn. Although this year's conference was smaller than expected with only 232 attendees, we know that budget constraints and travel probably played a role. However, this does make us pause to think about the future and support of TASFAA, especially in light of the fact this year's theme, Shaping Tomorrow's Future Today, since we do play such a major role in the future of colleges and students throughout the state of Texas.

For those that were able to attend, we had great general sessions from Trevor Summers and Justin Draeger, wonderful welcomes from Melet Leafgreen, Anne Walker and Andrew Hammontree of SWASFAA. The entertainment this year was spectacular, if not a little eerily spot-on from David Magee and Fungi Mungle. Did y'all see those pictures?!?!? And, we had great and poignant presentations from experts all across the state!

TASFAA was able to raise nearly \$1000 for the Mac Adams Scholarship and also was able to provide some much needed money to our community service recipient: The Reynolds Home.

If you missed the conference, please visit the conference site and take a look at the presentation materials. Nearly all of the presenters have offered their materials for you to reference, highlighting the collegiality of TASFAA!

Thank you to the conference committee for a lot of hard work, to everyone who attended and especially to those exhibitors who attended and supported us and to the folks who presented material to make this a terrific conference. See you again next year in Austin, TX!!!







Legislative Issues

Committee Members:

Christopher D. Murr, Chair, Texas State University Lisa G Blazer, PhD - University of Texas - San Antonio Jane I Caldwell - Texas Higher Education Coordinating Board Shannon L Crossland-Followill - Texas Tech University Delisa Falks - Texas A&M University James Hubener - Dallas County CCD Melet Leafgreen - Texas Christian University Elaine L Rivera - University of Texas - Pan American George C Torres - TG Anne E. Walker - Rice University Cathleen F Wright - Texas Lutheran University

Committee Activity (events, statistics, meetings, etc.): During the past year, the committee has:

- Developed the TASFAA position paper on state financial aid programs and disseminated it to state legislative aides and other officials.
- Crafted the TASFAA position paper on federal financial aid programs.
- Developed a letter of support for the B-On-Time Student Loan Relief Act of 2014 and the Granting Relief and Defending Students Act of 2014.
- Drafted the THESPC & TASFAA Position Paper on State Higher Education Financial Aid Programs.
- Increased the legislative alerts sent to TASFAA members (via the listserv) by 50%.
- Through several venues, collected informative input from stakeholders on the TASFAA position paper on state aid in order to further refine the document.

Pending Activity

In October and November, the committee will:

- Refine the state position paper and submit a revised version to the president for consideration by the board.
- Distribute the TASFAA position paper on federal financial aid programs.
- Disseminate the THESPC & TASFAA Position Paper on State Higher Education Financial Aid Programs.
- Disseminate the letter of support for the B-On-Time Student Loan Relief Act of 2014 and the Granting Relief and Defending Students Act of 2014.

Membership Committee

Committee Members: Nancy B Reid, Chair, University of Texas - Arlington

Membership statistics for 2013-2014:

156 institutions (1841 members) are current with their membership. 21 institutions (211 members) have not renewed from 2012-2013.

2013-2014 Membership by Institution Type

	J I
Public (2 Year)	
Public (4 Year)	720
Independent (2 Year)	4
Independent (4 Year)	263
Proprietary (Business School)	4
Proprietary (Technical/Trade)	41
Health Related/Nursing	15
Graduate/Professional	45
Consultant	9
Government Agency	19
Guaranty Agency	63
Lender	25
Secondary Market	3
Servicer	33
No Specified/Other	11

In an effort to insure that our membership database is accurate we sent several emails to the membership requesting they review their institution's members and remove anyone that was no longer with them. In additions we started working to correct the membership type Affiliate to Associate as Affiliate is an invalid membership type.

Nominations & Elections

Committee Members:

Pam Shuttlesworth, Chair, Dallas Community College District

Nominations were opened to the association membership in May. We had 3 candidates run for President Elect and we had 4 candidates run for the TASFAA Board. The slate of candidates was approved by the board at the September board meeting. The Elections took place in August the results are:

President Elect

Shannon Followill Texas Tech University

2 year board members

Karen Long-Trail Texas Wowan's University Christopher Murr Texas State University Marcos Mendez Texas A&M University Denise Welsh Panola College

Regional Training

Committee Members: Delisa Falks, Chair, Texas A&M

TASFAA Regional Training in partnership with Texas Guarantee Agency and Texas Higher Education Coordinating Board conducted the FY 14 regional training. We continue to work as a team to find ways to better serve our financial aid community by providing the best training experience at no expense.

Heather Fountain served as the Vice Chair and will take over as the Chair for the 2014-2015 award years.

This year's topics highlighted relevant new regulations and topics for financial aid offices such as the 150% Subsidized eligibility rules (Map 21), verification updates, Federal updates, state updates and student loan repayment.

We held training at 7 sites that included: Houston (2), Dallas/ Ft. Worth (2), El Paso. Lubbock, San Antonio.

Number of attendees per site as follows:

Houston Community College Southeast Learning Hub	Houston	69
Lone Star College - Kingwood	Houston	79
UTSA Downtown	San Antonio	66
Tarrant County College Trinity River Campus	Ft Worth	85
Eastfield College- Dallas CCC	Mesquite	111
El Paso Community College	El Paso	49
Lubbock Christian University	Lubbock	76

Total food cost was \$10,537.88.

We have had suggestions to have another site either in the Valley or West Texas. After discussion regarding this with TG, THECB we believe it would be best to add one site. This site would likely be in the Valley, and then hold one of our trainings at either TG or THECB as a webinar. I would suggest you eliminate the San Antonio site and select Austin as a site, the Austin site would have attendees in the audience as well as this be a webinar for anyone who is unable to get to one of the other sites.

The cost for two TASFAA training committee members was approximately \$3500.00 for expenses submitted to TASFAA for hotel, flights, and meals.

We had issues at one site with the caterer and we are working to address that particular site.

I have enjoyed working as co-chair of this committee for two years and chair for this past year. I feel very confident in Heather as she takes the lead on this committee.

Lastly I would like to thank Texas Guarantee and Texas Higher Education Coordinating Board for all their assistance with the Regional training. They are both great partners to work with and are very valuable to the Regional Trainings.

Site Selection

Committee Members: Beth Tolan, Chair, University of Texas at Dallas

The fall 2014 TASFAA Conference was held October 8-10 at the El Paso Camino Real Hotel & Convention Center. The fall 2015 TASFAA Conference site has been selected. The October 5-9, 2015 TASFAA Conference will be held at The Omni Austin Southpark Hotel in Austin, TX. The fall 2016 TASFAA Conference site has also been selected. The October 3-7, 2016 TASFAA Conference will be held The Embassy Suites Dallas-Frisco Hotel, Convention Center and Spa in Frisco, TX.

A very special thank you to Don Buehrer who completed and submitted various proposal requests (so many that we were able to find great locations for both 2015 and 2016) and to Don, Shannon Followill, Rafael Villarreal, Joseph Ruiz, and Phillip Applebaum for the conference site visits they completed in May 2014. We look forward to using 2015 to prepare for and review the processes involved in the selection of future conference sites.



Training

Marcos Mendez, Chair; Texas A&M University Melissa Mallett Bohnsack, Texas A&M University Becca Akbari, Texas A&M Health Science Center Angelika Williams, Texas State University-San Marcos Roy Tuberville, El Paso Community College **Russell Jeffrey, Concordia University** Vincent Carales, TG William Mack, The University of Texas at Dallas Yolanda Cleveland, The University of Texas at Arlington Ilaria Puente, The University of Houston Tierra Graves, Texas A&M University MarQuita Hackett, UT Tyler Iris Alejandro, Rice University **Robert Gaertner, Blinn College** Tanya Vittitow, University of Texas at Arlington **Consuela Mitchell, Tarrant County College District** Phillip Wambsganss, NTHEA/HESC

On October 8th- 9th the Training Committee welcomed about 44 participants to the 2013 ABC Workshop. The ABC Workshop takes place a day and a half before the Annual TASFAA Conference. The 2013 ABC Workshop kicked off at the Galveston Convention Center in Galveston, TX. The Training Committee presented on the basics of Financial Aid, including the application process, student eligibility, loans, Pell and campus based programs, verification, satisfactory academic progress, and professional judgment. We were excited to have Jane Caldwell from the Texas Higher Education Coordinating Board present a session on state programs to complete our workshop. The committee received positive feedback on all of the evaluations.

On May 12th-14th the 2014 New Aid Officers Workshop (NAOW) was held at the Sheraton in Arlington, TX. The workshop was well attended and the committee enjoyed putting on this great event. We had 72 attendees at this year's NAOW and the sessions ranged from student eligibility, need analysis, verification, Pell Grant and campus based programs, R2T4, loan repayment information, packaging and satisfactory academic progress. During one of the working lunches the attendees learned about "Dealing with Difficult Students", which was presented by a representative from TG. Lyn Kinyon from the Texas Higher Education Coordinating Board presented on State Programs. Everyone enjoyed learning the basic tools that are needed in order to become a successful financial aid advisor. TASFAA will be in great hands in the future.

Planning for the 2015 New Aid Officers Workshop is soon to begin. Presentations will be evaluated and evaluations will be reviewed in order to make the 2015 NAOW a successful workshop. The Committee is open to suggestions and feedback in order to continue to train our new staff at a high level.

I was an honor to serve as the Chair of the TASFAA Training Committee for the past two years. The Training Committee has a bright future and will continue to take training to new levels.





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The TASFAA Annual Report was created by Communications & Social Media Committee